

Mid-Market Database - MAIN SWITCHBOARD

Please select a module before
accessing these menus:

Go to Proactive
Customers Menu

Go to Re-active
Customers Menu

Go to BMS Targets
Menu

Browse Mid-Mkt
Accounts

Go to the Select
Module Menu

Go to the Print
Reports Menu

Selected Module:

Bill Data Month/Year:

User:

2/1/1999

#Name?

Exit Application

202

206

208

210

212

200

Figure 2

Mid-Market Database - Proactive Menu

Browse Proactive Customers-All

Input Proactive Contacts

Browse/Edit/Proactive Contacts

Selected Module:

Bill Data Month/Year:

User:

#Name?

2/1/1999

Shortcut to Print Reports Menu



Figure 3

Browse Proactive Customers Form - For Selected Module

MAN FID	S3VGO	Select by name:	
local service	\$1,669,725	Select by MAN:	
number of accts	347		
Name assigned to	1ST FRANKLIN		
MAN			
AE assigned to			
Customer			
Customer Contact			
Contact Number			
Remarks			

MAN FID	S0427	Select by name:	
local service	\$4,259,165	Select by MAN:	
number of accts	15		
Name assigned to	A.C. WHITE TRANSFER &		
MAN			
AE assigned to			
Customer			
Customer Contact			
Contact Number			
Remarks			

MAN FID	S0NG5	Select by name:	
local service	\$8,682,865	Select by MAN:	
number of accts	21		
Name assigned to	A.J. MORRIS &		
MAN			
AE assigned to			
Customer			
Customer Contact			
Contact Number			
Remarks			

406
408

400

Figure 4

502

Edit Proactive Customer Data

Customer Data that can be edited:

AE Assigned:	
Customer Contact Name:	
Customer Contact Phone:	
Remarks:	

504

Customer Data that cannot be edited:

Customer Name:	1ST FRANKLIN
MAN FID:	S3VGQ
Module:	C
Total Local Service:	\$11,669.72
Total Number of Accts:	47
Edited by:	VIRGINIA LEWIS
Last Edit:	5/26/1999

User:

#Name?

Selected Module:

C

Input Status:

EDIT DATA



Save Changes

Input Contact for
Displayed Customer



506

507

508

500

510

512

Figure 5

Enter Proactive Contacts

SV, MV, OV, SP, MP, OP

Date of Contact

Type of Quality Contact

Remarks

Click all Products Discussed:

Click all Products "Sold" & Indicate Number of each product:

CLUB
DAB
BMS
RSB
MTTB
EDI
Elec. Billing
Select

CLUB
DAB
BMS
RSB
MTTB
EDI
Elec. Billing
Select

0
0
0
0
0
0
0
0

View Quality Contact Guidelines

SV, MV, SP, MP, OP

Select by Assigned Name:

Select by MAN FID:

Customer Data:

Customer Name:

1ST FRANKLIN

MAN FID:

S3VGQ

Total Local Service:

\$11,669.72

Total Number of Accts:

47

Module:

C

AE Assigned:

Customer Contact Name:

Customer Contact Phone:

To make changes to this data, use the Browse Proactive Customers Form

Follow-up Dates:

Follow-up Remarks:

Figure 6

608

600

614

612

Browse Mid Mkt Accounts - by Billing Name

bill number 205 221 0585 286
 cent fid CCO
 site ALABAMA TRIFIT
 name STORE
 addr2 P O BOX 621
 addr3 JASPER AL 35502
 addr4
 addr5
 man fid S1NA2
 local service \$21.28
 input date 3/7/1989
 input by system
 Show Accts for Selected MAN
 Create a Select Referral for this customer

Jump to Name beginning with:
 A B C D E F G H I J K L M N O P Q R S T U V W X Y Z Not Alpha

Ensure that the appropriate Module is selected before moving to Reactive or BMS Tables.

Move Displayed Customer/Account to Reactive Tables

Move Displayed Account to BMS Target Table

bill number 205 214 7355 210
 cent fid CCO
 site A
 name BHAM TWO WAY
 addr2 2425 2ND AV S
 addr3 BIRMINGHAM AL 35233
 addr4
 addr5
 man fid S1H33
 local service \$216.50
 input date 3/7/1989
 input by system
 Show Accts for Selected MAN
 Create a Select Referral for this customer

Jump to Name beginning with:
 A B C D E F G H I J K L M N O P Q R S T U V W X Y Z Not Alpha

Ensure that the appropriate Module is selected before moving to Reactive or BMS Tables.

Move Displayed Customer/Account to Reactive Tables

Move Displayed Account to BMS Target Table

bill number 205 221 0450 001
 cent fid CCO
 site A
 name COMPUTER CONNECTIONS
 addr2 P O BOX 1802
 addr3 JASPER AL 35502
 addr4
 addr5
 man fid S784S
 local service \$76.65
 input date 3/7/1989
 input by system

Jump to Name beginning with:
 A B C D E F G H I J K L M N O P Q R S T U V W X Y Z Not Alpha

Ensure that the appropriate Module is selected before moving to Reactive or BMS Tables.

Move Displayed Customer/Account to Reactive Tables

Move Displayed Account to BMS Target Table

Figure 7